One Big Media Company

GOHIGHLEVEL SNAPSHOT · SALONS & BARBERSHOPS

Salon Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

What's inside

A done-for-you GoHighLevel system for salons and barbershops: new-client follow-up, reminders that cut no-shows, automatic rebooking, slow-day fill-ups and lapsed-client win-backs.

- 21 salon-specific workflows, from speed-to-lead to slow-day fill-ups
- Sales pipeline built for salons: First Visit Booked, First Visit Completed, Rebook Offered
- Client journey pipeline that tracks next visits and regular clients
- Reactivation pipeline for lapsed clients
- New Client Appointment calendar with confirmation, 24-hour and 2-hour reminders
- Cancellation and deposit policy language built into confirmations and no-show follow-up
- New-client form with usual service, preferred stylist and preferred day
- Client feedback form that routes 4-5 star clients to Google reviews
- Refer-a-friend form and thank-you automation
- Rebooking reminders driven by each client's rebook interval
- Holiday-ready seasonal campaign you can reuse for prom, weddings and back-to-school
- Salon-specific custom fields including Preferred Stylist, Rebook Interval and Formula Notes
- 20 pre-filled custom values so the whole system re-brands in minutes
- 12-step setup guide, 6-lesson install course and agency sales kit

Pipelines

Sales Pipeline

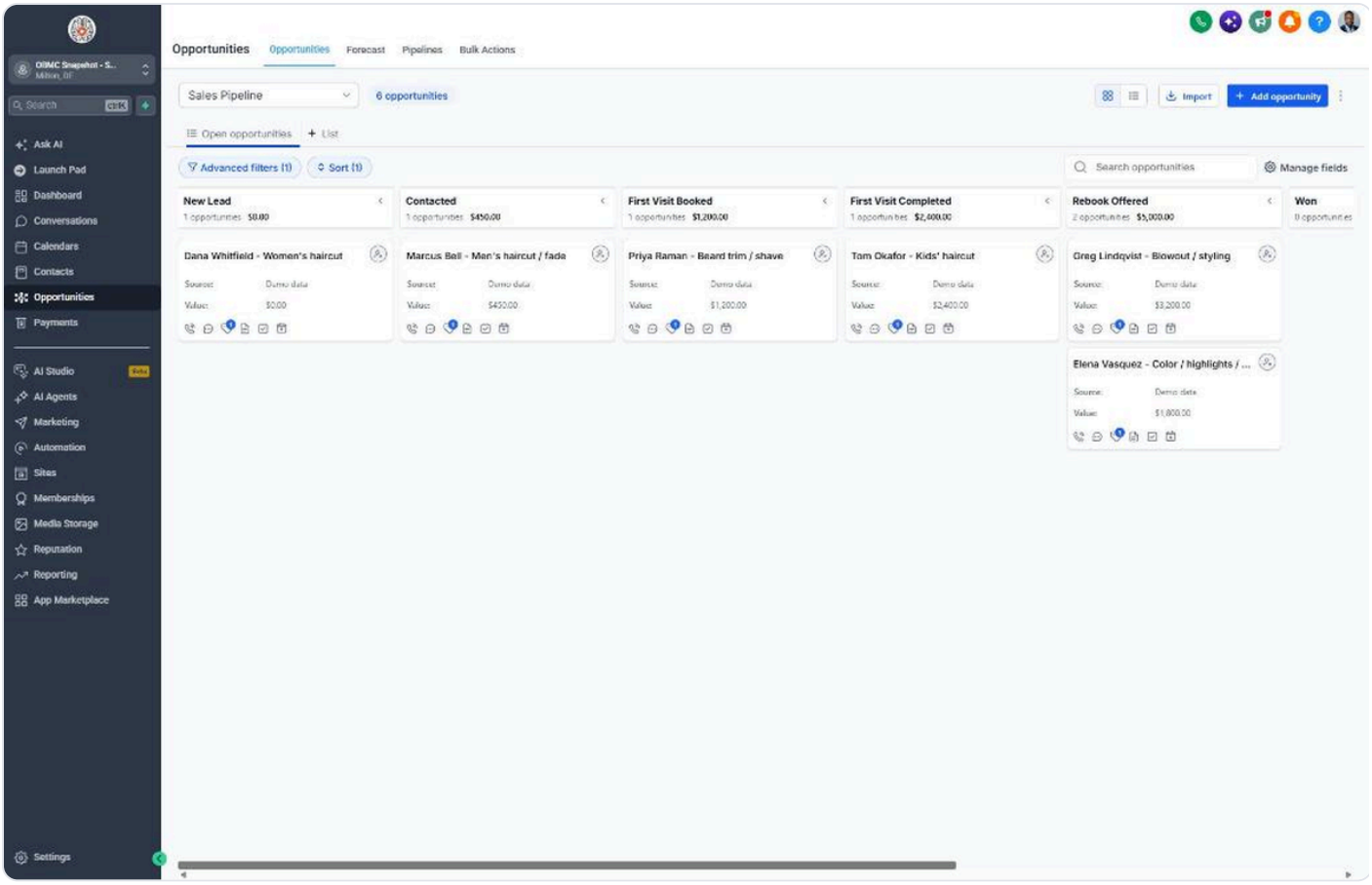
New Lead | Contacted | First Visit Booked | First Visit Completed | Rebook Offered | Won | Lost | Long-Term Nurture

Customer Journey

Next Visit Booked | Regular Client | Visit Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
6 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
1 opportunities $0.00
Contacted
1 opportunities $450.00
First Visit Booked
1 opportunities $1,200.00
First Visit Completed
1 opportunities $2,400.00
Rebook Offered
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - Women's haircut
Marcus Bell - Men's haircut / fade
Priya Raman - Beard trim / shave
Tom Okafor - Kids' haircut
Greg Lindqvist - Blowout / styling
Elena Vasquez - Color / highlights / ...
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

INSTALL

12-step setup checklist

1. **Load the snapshot**
   Open the snapshot share link while logged in to your agency to import it. Go to Account Snapshots > Imported Snapshots, open the actions menu on the Salon snapshot and choose Push to Sub-Account, or pick it when creating a new sub-account under Sub-Accounts > Create Sub-Account.

2. **Complete the business profile**
   In the salon's sub-account, go to Settings > Business Profile and add the salon name, address, phone, logo and time zone. Accurate hours and time zone keep reminders from going out at odd times.

3. **Fill in custom values**
   Go to Settings > Custom Values and update the business name, owner name, phone and service area. Confirm the new-client offer, referral reward, returning-client offer and birthday offer with the owner.

4. **Connect the phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port the salon's number, then finish A2P 10DLC registration in the Trust Center. Use appointment reminders plus marketing as the use case and include sample messages from this snapshot.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain such as mail.salonname.com. Verify the DNS records so confirmations reach the inbox.

6. **Configure calendars and deposits**
   Go to Calendars > Calendar Settings and edit New Client Appointment: assign stylists, set service durations and buffers, and turn on payments if the salon takes deposits (connect Stripe under Payments > Integrations first). Copy the booking link into the booking_link custom value.

7. **Customize and embed the forms**
   Go to Sites > Forms > Builder. Update the service list, stylist names and preferred days, then embed the form on the website and link it from the Instagram bio.

8. **Review the pipelines**
   Go to Opportunities > Pipelines and walk through First Visit Booked, First Visit Completed and Rebook Offered. Show the front desk how to move a card to Won when a new client books their second visit.

9. **Connect Google reviews**
   Go to Settings > Integrations and connect the salon's Google Business Profile. Confirm the review link under Reputation > Settings and paste it into the review_link custom value.

10 **Set up rebook and slow-day tagging**
Under Contacts > Smart Lists, build a list of clients past their Rebook Interval and tag them 'service due'. Decide who checks the book each Monday and tags flexible clients 'niche campaign' when midweek gaps appear.

11 **Assign alerts and publish workflows**
Go to Automation > Workflows, open each workflow, set alerts to the front desk or owner, confirm the From name and publish. Keep workflow 20 in draft until early November.

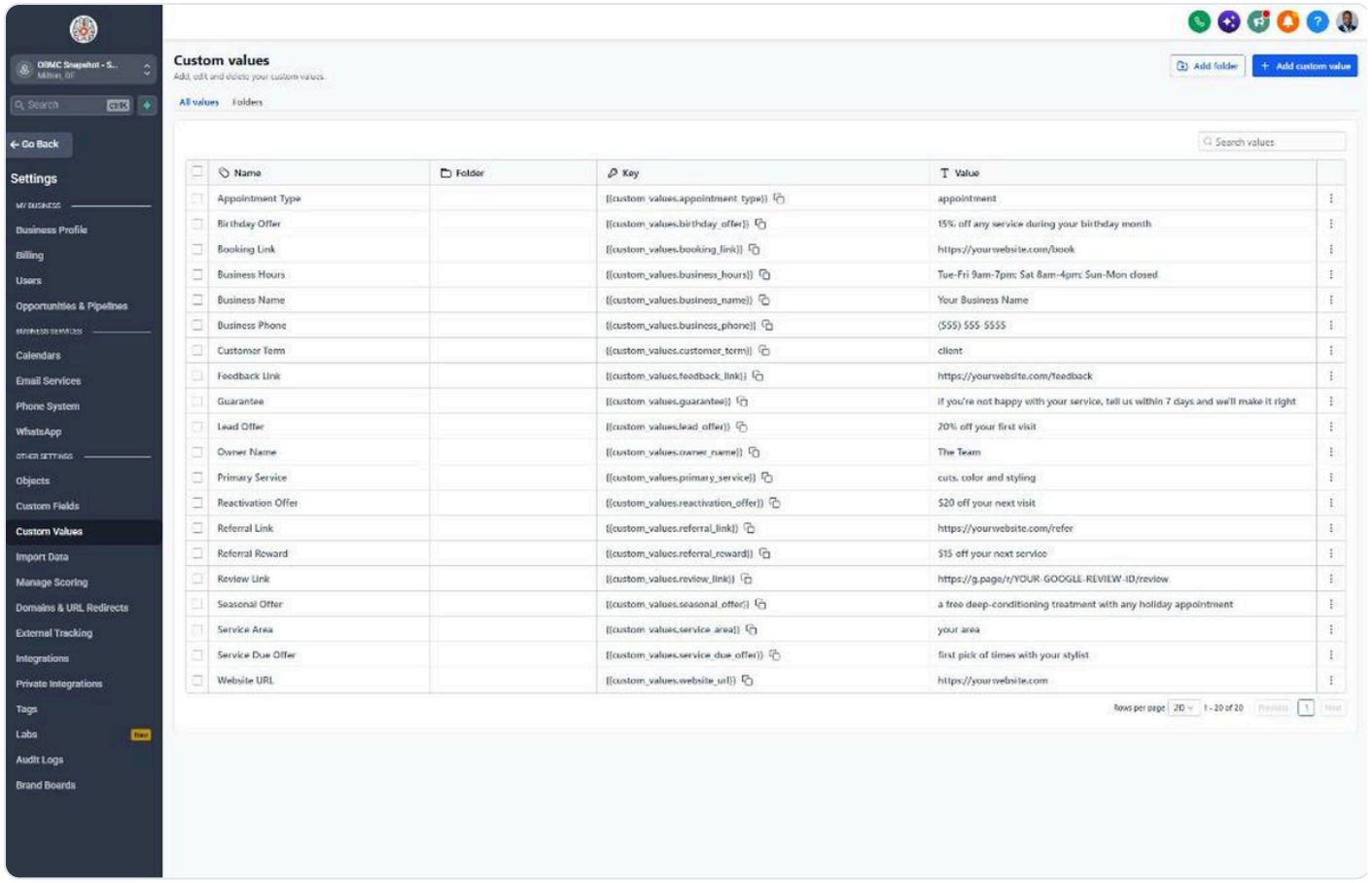
12 **Go live test**
Submit the form as a test contact, call the salon number and let it ring out, then book a test appointment. Confirm in Conversations that every message and the cancellation policy came through, check the team alert, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Salon default / what to enter
Business Name	Your business name
Business Phone	Your business phone
Owner Name	Your owner name
Website URL	Your website url
Booking Link	Your booking link
Review Link	Your review link
Feedback Link	Your feedback link
Referral Link	Your referral link
Service Area	Your service area
Customer Term	client
Appointment Type	appointment
Primary Service	cuts, color and styling
Lead Offer	20% off your first visit
Guarantee	if you're not happy with your service, tell us within 7 days and we'll make it right
Referral Reward	$15 off your next service
Reactivation Offer	$20 off your next visit
Seasonal Offer	a free deep-conditioning treatment with any holiday appointment
Service Due Offer	first pick of times with your stylist
Birthday Offer	15% off any service during your birthday month
Business Hours	Tue-Fri 9am-7pm; Sat 8am-4pm; Sun-Mon closed


Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
appointment
Birthday Offer
{{custom_values.birthday_offer}}
15% off any service during your birthday month
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Tue-Fri 9am-7pm; Sat 8am-4pm; Sun-Mon closed
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
client
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
If you're not happy with your service, tell us within 7 days and we'll make it right
Lead Offer
{{custom_values.lead_offer}}
20% off your first visit
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
cuts, color and styling
Reactivation Offer
{{custom_values.reactivation_offer}}
$20 off your next visit
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
$15 off your next service
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free deep-conditioning treatment with any holiday appointment
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
first pick of times with your stylist
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Go Back
Settings
Business Profile
Billing
Users
Opportunities & Pipelines
Calendars
Email Services
Phone System
WhatsApp
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
New
Audit Logs
Brand Boards

WALKTHROUGH

All 21 workflows

01 · New Lead → Speed-to-Lead + 7-Day Follow-Up

TRIGGER Form 01 submitted, or tag 'start lead nurture' added

STEPS Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

Stops when the lead replies

> Hi **first name**, thanks for reaching out to **business name**! As a new client you get **lead offer**. Grab a time here: **booking link** or reply with what you're looking for. Reply STOP to opt out.

02 · Missed Call → Instant Text-Back

TRIGGER Inbound call is busy, no-answer or voicemail

STEPS Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

Runs every time

> Hi, it's **business name**. Sorry we missed your call! We're probably mid-appointment. Reply here and we'll get right back to you, or book online anytime: **booking link** Reply STOP to opt out.

03 · Customer Replied → Hot Lead Alert

TRIGGER Customer replies (SMS, email, chat)

STEPS Tag hot lead → Text the team the reply so nobody waits

Runs every time

04 · Appointment Booked → Confirm + Reminders

TRIGGER Customer books on the calendar

STEPS Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

Runs for every booking

> You're booked, **first name**! Your **appointment type** at **business name** is **start time**. Need to change it? Please give us 24 hours' notice: **reschedule link**

05 · No-Show → Reschedule Recovery

TRIGGER Appointment status changes to No-show

STEPS Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

Stops when they reply

> Hi **first name**, we missed you at **business name** today. Hope everything's okay! Want to grab a new time? **booking link**

06 · Appointment Completed → Proposal Prep

TRIGGER Appointment status changes to Showed

STEPS Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

Runs every time

07 · Proposal Sent → Follow-Up Sequence

TRIGGER Deal moves to Proposal Sent

STEPS Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

Stops when they reply

> Hi **first name**, how are you loving your new look? Want us to book your next visit now so you get the day and time you want? Just reply with what works.

08 · Deal Won → Welcome + Customer Journey

TRIGGER Deal moves to Won

STEPS Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

Runs every time

> Welcome to the **business name** family, **first name**! Save this number so you can text us to book, move or ask about an appointment anytime.

09 · Deal Lost → 30/60/90-Day Nurture

TRIGGER Deal moves to Lost

STEPS Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

Stops when they reply

10 · Job Completed → Feedback Request

TRIGGER Customer Journey deal moves to Completed

STEPS Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

Runs every time

Hi **first name**, thanks for visiting **business name**! How did we do? It takes about 20 seconds: **feedback link**

11 · Feedback Submitted → Review Ask or Service Recovery

TRIGGER Form 02 submitted

STEPS If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

Runs every time

12 · Happy Customer → Referral Request

TRIGGER Tag promoter added

STEPS Wait 3 days → Referral SMS with reward → Referral email with reward

Once per contact

Hi **first name**, thank you for the kind words! Know someone who'd love **business name**? Send them our way and you'll get **referral reward**: **referral link**

13 · Referral Received → Thank You + Team Alert

TRIGGER Form 03 submitted

STEPS Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

Runs every time

14 · Database Reactivation Campaign

TRIGGER Tag 'start reactivation' added (bulk-tag an imported list)

STEPS Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

Stops when they reply

Hi **first name**, it's **owner name** from **business name**. It's been a while and we miss you! Ready for a fresh cut or color? Reply STOP to opt out.

15 · Invoice Sent → Payment Reminders
TRIGGER Invoice sent
STEPS Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
Payments workflow (16) stops it when the invoice is paid

16 · Payment Received → Thank You
TRIGGER Payment received
STEPS Tag customer, remove past-due tag → Thank-you SMS → Team alert
Runs every time

17 · Birthday → Gift Offer
TRIGGER Contact's birthday (date of birth on file)
STEPS Birthday SMS with gift offer → Birthday email
Yearly

18 · Stale Deal Alert (7 Days No Movement)
TRIGGER Sales Pipeline deal idle 7+ days
STEPS Text + email alert to the team
Runs every time

19 · Service Due → Rebook Reminder
TRIGGER Tag 'service due' added
STEPS Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
Stops when they reply

> Hi **first name**, it's **business name**. You're due for your next visit! Book now for **service due offer**: **booking link** Reply STOP to opt out.

20 · Seasonal Promo Campaign
TRIGGER Tag 'seasonal promo' added
STEPS Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
Stops when they reply

> Hi **first name**, **business name** here. Holiday appointments go fast! Book now and get **seasonal offer**. Reply YES or book: **booking link** Reply STOP to opt out.

21 · Slow-Day Fill-Up → Midweek Openings

TRIGGER Tag 'niche campaign' added

STEPS Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

Stops when they reply

Hi **first name**, it's **business name**. We have a few open chairs this week on our quieter weekdays. Want first pick? Book here: **booking link** Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to reply	Answer every new inquiry within 5 minutes during open hours	Conversations and the Sales Pipeline opportunity timeline
No-show rate	Keep no-shows as low as possible and lower them each quarter	Reporting > Appointment Report (no-show status)
New-client rebook rate	Get most first-time clients to book a second visit	Opportunities > Pipelines, Rebook Offered vs Won
Midweek fill	Fill a steady share of open midweek slots from each workflow 21 send	Calendars > Appointments and Automation > Workflows > 21 > Execution Logs
Lapsed clients returned	Bring back a steady number of lapsed clients every reactivation send	Reactivation pipeline, Booked stage
New Google reviews	Earn several new 5-star reviews every month	Reputation > Overview

Compliance notes

- TCPA and A2P 10DLC: only text clients who opted in (booking consent or a form checkbox), keep 'Reply STOP to opt out' on first messages, and complete A2P registration before sending.
- Deposits and cancellation fees: state the policy clearly at booking and in the confirmation, and make sure it matches what the salon actually charges.
- Reviews: never offer discounts or freebies in exchange for a review, and don't filter review requests in a way your review platform prohibits. The referral reward is for referrals only.
- Before-and-after photos: get written client permission before using their photos in texts, emails or social posts.

Mini-course outline

1. **Install and brand the salon snapshot**: Get the snapshot into the salon's sub-account and branded with its name, offers and hours.
2. **Capture new clients and reply in seconds**: Make sure every inquiry and missed call gets an instant response with the new-client offer.
3. **Bookings, deposits and no-shows**: Set up the calendar, cancellation policy and deposits so no-shows stop costing the salon.
4. **Turn first visits into regulars**: Use the Sales Pipeline to get every new client to book a second visit.

5. **Reviews, referrals and lapsed clients**: Turn happy clients into reviews and referrals and bring lapsed clients back.
6. **Launch rebooking and slow-day fill-ups**: Keep the book full every week and track the numbers that matter to the owner.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.